Excel Intermediate Training Objective

To learn the tools and features of Excel 2016, and gain vital skills to use Excel more efficiently and effectively.

What you can expect to learn from this class

- How to create and edit Links in Excel
- How to Name areas in an Excel workbook
- How to use the AutoCalculate tool in Excel
- How to create and use an Excel Function
- How to create and modify Charts in Excel
- How to identify the different Charts available in Excel
- How to create a Text box and Arrows in Excel
- How to Print a Chart in Excel

Who should take this class

Any person who is familiar with the basics in Excel and who is ready to begin learning the intermediate-level features.

Excel Tips and Shortcuts:

Control -Z to Undo.
Control -S to perform frequent Quick Saves.
Control -Home to go to the top of worksheet
Control -C to Copy
Control -X to Cut
Control -V to Paste
Double-click to Edit a cell
Shift-click to select a range of cells
Option + = to create AutoSum
Linking helps to consolidate data from many workbooks/sheets into one. Create summary workbooks/sheets for various views of the same data; create a large model from several models. You can link individual cells or cell ranges from one worksheet to another worksheet. When you update information in one worksheet, it is automatically updated in the linked worksheet. However, formulas cannot be transferred.

**Linking Cells**

1. Open the **Dependent** workbook/sheet, the worksheet you want to paste links to.
2. Open the **Source** workbook, the worksheet you want to copy links from.
3. Select the cell or range of cells to link from in the **Source** workbook/sheet, select **Copy** from the **File Tab** menu.
4. Switch back to the **Dependent** workbook/sheet.
5. Click once where you want to insert the link, click on the down arrow under the **Paste** icon (**Home Tab** menu) and select **Paste Link** button.

The dependent workbook/sheet contains an external reference formula—a formula that refers to a cell or cell range in the supporting document, i.e., `{=[workbook.xls]sheetname!$D$9}`.

**Copying and Pasting Link between Excel and Word**

You can also create a link between data in Excel and Word so that when information is updated in the Excel worksheet, it is also updated in Word.

1. Select the cell or range of cells to link from in the workbook, select **Copy** from the **Home tab** menu.
2. Open MS Word Document
3. Click once where you want to insert the link, click on the down arrow under the **Paste** icon (**Home Tab** menu) and select **Paste Special**.
4. Choose **All** from the list to paste the copied content, and choose **Paste Link**. Then press **OK**.

**Changing links/formulas to values**

At some point you may want to break a link in a dependent workbook/sheet or change formulas to values.

**To break links or change formulas to values:**
1. Select the cell or range of cells that you want to convert.
2. Select Copy from the Home Tab menu.
3. Click on the down arrow under the Paste icon (Home Tab menu) and select Paste Values.

Naming cells and cell ranges
Name a cell or range of cells for easy access to a worksheet area.

To create a name:

1. Select the cell or range of cells to name.
2. Click once in the Name Box in the left most part of the formula bar
3. Type in a Name for the selection; press Enter.
   *Tip: Remember not to include spaces when you name your cells.
4. Access the named area by clicking on the down arrow in the name box and selecting the named area.

To delete the named area: from the Formulas tab, click on the Name Manager icon. Choose New, Edit or Delete to work with named cells.

AutoCalculate
Use the AutoCalculate feature to automatically view selected areas AVERAGE, COUNT, COUNT NUMS, MIN, MAX, or SUM.
Select the area to calculate then right-click on the AutoCalculate area in the Status Bar (bottom bar, to the right of “Ready”) and choose from the options available. Your calculation will appear on the right side of the Status Bar.
Function Library

1. Click in the cell where you want to create a formula.
2. Click on Insert Function underneath the Formulas Tab.
3. Choose from the appropriate category where you think your function would be. If you're uncertain, look at All.
4. Complete the function by filling in the required data in the function's Argument. Use the OK button or click Help on this function to view examples of the function syntax.
5. Click OK to close the Function dialog.

*Tip: You can also choose from any of the functions available under the Function tools.

If Function

Use the IF function to create conditional formulas that analyze data and return a value based on the results of the analysis. For example, you can configure your worksheet to:

- Display a message when a condition is true, for example, “overdue” when an unpaid invoice is over 30 days old.
- Return a value based on the results of a calculation, such as a discount percentage if an invoice is paid within 30 days of the invoice date.
- Cross-check for errors. For example, display an error message if row and column totals don’t agree.
- Prevent the #DIV/0! Error value from appearing when the divisor field is bland or 0 (zero).

The IF function uses the following arguments:

=IF(logical_test, value_if_true, value_if_false).

=SUMIF(B3:B10,">5")

=COUNTIF(D1:D180,"textemaple")
Creating Charts

Create a chart to show the visual relationship between your data.

There are eight basic chart types: area, bar, column, line, pie, doughnut, radar, XY (Scatter), pivot chart and etc.

There are two categories of charts: Embedded and Stand Alone. An embedded chart is part of a worksheet; a stand-alone chart is separate from the worksheet.

Both types of charts are automatically linked so that any changes to the worksheet will appear in the associated charts.

The x axis (the horizontal line) shows the data classification; the y axis (the vertical line) shows the quantity or unit of measure.

Tip: to chart non-consecutive data, use the Control/Command key when making selections.

Use the ChartWizard tool in the Standard toolbar to guide you through the steps for making charts.

<table>
<thead>
<tr>
<th>Chart Types</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line and Area</td>
<td>Illustrate trends.</td>
</tr>
<tr>
<td>Pie</td>
<td>Display relationship of parts to whole. Note: only one data series.</td>
</tr>
<tr>
<td>Doughnut</td>
<td>Like the Pie chart, but allows for charting more than one data series.</td>
</tr>
<tr>
<td>XY</td>
<td>Correlates relationships between data.</td>
</tr>
<tr>
<td>HLCO</td>
<td>Represents values within values.</td>
</tr>
<tr>
<td>Radar</td>
<td>Compares actual and projected data.</td>
</tr>
</tbody>
</table>

Creating Stand Alone Charts

1. Select the range of data and labels to chart.
2. Press F11. A default chart is made available.
3. A Chart tab is added to the workbook.
Embedding Charts

1. Click and drag over the range of data and labels (exclude titles) you want to chart. (Do not select empty cells outside the area or a title)
2. Click on the Insert tab, then choose from the available Chart types.
3. Vary the Chart elements by choosing from the various Chart Layouts.
4. Experiment with the Chart Styles and Chart Types, as needed.

Modifying Charts

Resizing, moving and deleting an embedded chart:

To resize an embedded chart: click inside the chart. Position the mouse pointer on any one of the 8 resizing handles until you get a double-headed arrow. Click and drag on the arrows to resize

To move a chart: click anywhere inside the chart and drag it

To delete a chart: click once on the chart and press the Delete key

Right Button Options:

- Change the chart type: select Chart Type
- Insert Titles: add a title, and axis labels
- Insert Axes: add or remove axis
- Insert Gridlines: add or remove gridlines
- Insert Data Labels: add values, labels or none

Double-Click on Object Options:

- Format Chart Area: Format Patterns and Font
- Format Plot Area: Format the borders and colors/shading of the plot area
- Format Axis: Format Patterns, Scale, Font, Number and Alignment
- Format Data Series: Format Patterns, Axis, Name & Values, Y Error Bars, Data Labels
- Format Legend: Format Patterns, Font, and Placement

To add, edit or delete the data series: Select the chart by clicking on it; click on the ChartWizard tool; select the new range of cells from the worksheet.

To add arrows or lines: click on the Drawing tool. The draw toolbar opens. Click on the tool of choice, then click and drag to shape the object.

To add a text box: click on the Text Box tool, the mouse pointer becomes a cross. Click and drag to create a text box and type in the desired text. Type in the desired text.
To edit existing text: click once on the text object to select it, then click on the text to edit.

Printing

Print an embedded chart using the Print dialog. If you want to print the embedded chart as if it were a stand-alone chart (to fit it onto one page), double click on the chart, then print.

Subtotaling, Grouping and Outlining Data

Use the subtotaling, grouping and outlining data tools to organize and consolidate data for more meaningful analysis.

You will first need to sort a column of data before grouping it.
1. Select the range of cells you wish to include in the analysis.
2. Click on the Data tab, then choose Sort.
3. Choose a column from the Sort By pull-down menu. Select OK.
4. Choose the Group tool and select Row or Column
5. Click on the Subtotal tool, select the appropriate option from the Change In menu, function, and subtotal break option.
6. Click OK to view subtotals.